G appjetty

USER MANUAL



Smart Alerts

Version: 3.2

Compatibility:

Microsoft Dynamics 365 (Online and On-premises)

Browser Compatibility:

Edge (v12) and above Firefox (v29) and above Chrome (v33) and above Safari (v7.1) and above Opera (v20) and above

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Introduction

Smart Alerts for Dynamics CRM is a meticulously developed plugin that enables Dynamics CRM users to add and manage alerts for different entities in the CRM. Once Microsoft Dynamics CRM Smart Alerts is integrated, CRM users can add critical data/information to individual records. Thereafter, every time the connected CRM users access a particular record, they will receive an alert about the upcoming events, workflows, follow-ups, and other actions that need immediate attention.

Using Smart Alerts for Dynamics CRM, you can manage bulk alerts, add multiple alerts for each record, set alert types, cascade alerts, set criteria-based alerts, get alert in email directly, manage user roles, add start and expiry date for each alert and do much more!

Smart Alert can smartly be configured and used in any language the CRM supports.

Benefits of Smart Alerts

- Address customer issues on time
- Add new custom alert level
- Reduce Response Cycles
- Alerts- General Announcement Alert (Global)
- Alert Dashboard: Track users wise alerts
- Streamline Business Processes
- Never miss on Follow-ups
- Enable users to take immediate action
- Boost productivity

Prerequisites

Following point must be followed before starting the Plugin installation:

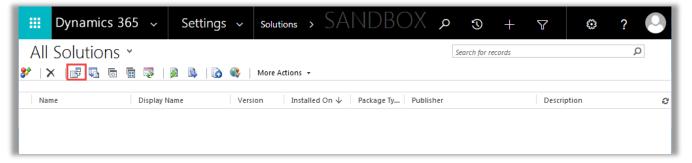
• You should be logged into Dynamics 365, Online or On-premises.

Installation & License Activation

Installation Steps

To install 'Smart Alerts' plugin, the following steps has to be followed:

- On purchasing the plugin, you will get a zip file named "SmartAlerts.zip".
- Login into your CRM Account and click **on Settings -> Solutions.**
- Click on 'Import' to upload and install the Solution.

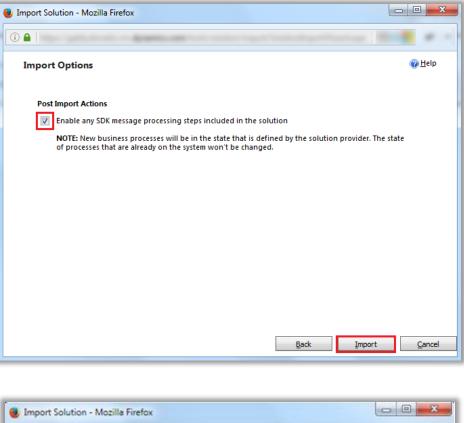


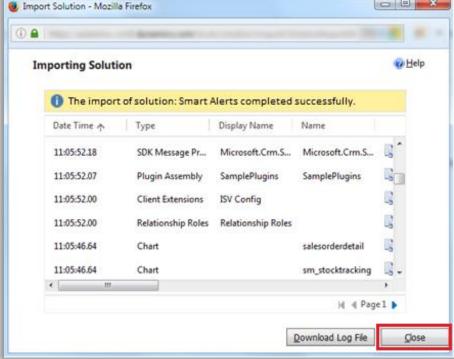
• Click on **'Choose File** button and choose the 'Package Zip' File for **Smart Alerts** from the Import Solution Window.

Import Solution - Google Chrome	- • ×
Select Solution Package	@ <u>H</u> eip
Select the compressed (.zip or .cab) file that contain solution you want to import and click Next.	is the
Choose File SmartAlerts.zip	
<u>B</u> ack <u>N</u> ext	<u>C</u> ancel

- Click on 'Next' for further processing.
- After clicking on the 'Next' button, the Import Options window will appear.

• Check the box to enable any SDK message processing steps included in the solution and click on 'Import' button to Import the Solution.





• Click on 'Close' after successful completion message is displayed.

All Solutions ▼	 Dynamics 365	Settings 🗸	Solutions >			
	 	🖻 🗟 🖗 🗟 [🁌 🚯 More Actio	ns 👻		
SmartAlerts Smart Alerts 3.2.0.0 7/19/2021 Managed AppJetty						
	Name	Display Name	Version In	istalled On \downarrow P	ackage T	Publisher

• Once you import the solution, it will be displayed in the solutions grid view.

License Activation

- Double click on **'Smart Alerts'** solution to configure the plugin with your license key.
- This will open a new window. Click on **'Configuration'** from the options provided on the left side.

🦉 🌮 Information			
	🖸 appjetty	Expire On:	Status:
🐉 Information 🔶			Unregistered
Provide the configuration			
Components	Profile		
 ☐ Option Sets ▲ Client Extensions ▲ Web Resources 	Activate Your Free Trial		
 ₹. Processes ► +□ Plug-in Assemblies Sdk Message Processin 	First Name* Last Name*		
Service Endpoints	Email*		
Reports	For any queries, visit AppJetty Support		
Article Templates	Activate		
Email Templates Mail Merge Templates Security Roles			

- You can activate your **one-month free trial**.
- To get a one-month free trial license key, fill out the details and click on 'Activate' button.

Thank you for registering. Your trial is activated.	
mank you for registering. Four than's detivated.	
	Close

• Your trial will get activated and expiry date will be displayed on top.

C ionaiothy	Expires On:	Status:
🖸 appjetty	9/1/2019	Trial
Profile Setup SMS Setup		
Purchase License		
Your free trial is currently active. You can purchase the plugin anytime by	clicking on the below but	ton.
Buy Now		
License Details		
License Key:		
Your free trial will expire in 30 day(s)		
Note:This is not real time information and will be updated in the next 24 h	iours.	
For any queries, visit AppJetty Support		

• You can purchase the licensed version any time. To purchase the license, click on **'Buy Now'** button.

Purchase Lic	cense					
Your free trial is expired. You can purchase the plugin anytime by clicking on the below button.						
	Buy Now					
License Deta	ails					
License Key:	Your trial is expired.					
For any queries, visit	t AppJetty Support					

- On expiration of Trial, a message will appear that the trial has expired. Now to purchase the license click on **'Buy Now'** button.
- This will redirect you to our product page and a pop-up will appear. Click on 'Add to Cart' button and complete the purchase process.

SMART ALERTS	Smart Alerts For Dynamics CRM Dynamics CRM : Dynamics CRM 2016(v8.0) and above	Add Your Review
((()))) Convert	Perhaps, your Microsoft Dynamics CRM lacks the feature of o and alerts. Result? Prolonged Response Cycles, unaddressed missed deadlines! To address this problem, you need to have you with alerts on the important CRM entities. Smart Alerts is a meticulously developed Microsoft Dynamics enables CRM users to add and manage alerts for different er you integrate Smart Alerts to your CRM, it becomes easy for data/information to individual and bulk records. Every time the assigned CRM users access a particular record about the upcoming events, workflows, follow-ups and other immediate attention. Using the Dynamics CRM scheduling al create and view bulk alerts, add multiple alerts for each reco start and expiry date for each record and do much more!	customer issues and a feature that provides CRM Alerts Plugin that titles in the CRM. Once you to add critical I, they get a pop-up alert actions that need erts feature, you can
	Your Domain *	
	Try Now	🗮 🛛 Add To Cart

• On successfully completing the purchase process, you will receive your license key via email along with steps to complete the license configuration.

License Deta	ils	
License Key:	Your trial is expired.	Activate
For any queries, visit	AppJetty Support	

- Enter the New License key received on mail. This will enable the 'Activate' button.
- Click on 'Activate' button to activate your license.

License Details			
License Key:			
Your free trial will expire in 30	day(s)		
Note:This is not real time inform	nation and will be updated	l in the next 24 hours.	
For any queries, visit AppJetty St			

• Once you have activated the license, 'Setup' tab and 'SMS Setup' tab will be displayed besides the 'Profile' tab.

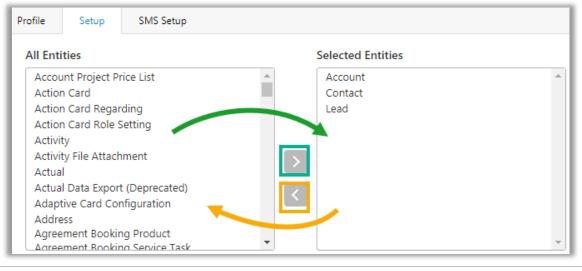
rofile Setup SMS Setup					
All Entities	-	Selected En	tities		
Account Project Price List Action Card Action Card Regarding Action Card Role Setting Activity Activity File Attachment Actual Actual Data Export (Deprecated Adaptive Card Configuration Address Agreement Booking Product Acreement Booking Service Tass Alert Level Name and Icon ??		Account Contact Lead		*	
	Choose file	Browse	ADD Click here to d	ownload sample icon	
Default Value For Sorting 🕜	Created On		\sim		
)				

Setup (for App)

To manage the default configuration settings, click on **'Setup'** tab.

All Entities:

• You can move required entities to **"Selected Entities"** list from **"All Entities"** by using **"Add"** and **"Remove"** icon. You can create alerts only for those entities that are selected here.



- Alert Level Name and Icon:
 - You can add the custom alert levels. Insert "Alert Level Name" and select the specific icon for the uniqueness of the alert. You can add a maximum of 5 different custom alert levels.
 - You can download the sample icon. The icon size must be 16x16 pixels.

Profile	Setup	SMS Setup						
All Enti	ties				Selected	Entities		
Action Action Activit Activit Actual Actual Adapt Addre Agree	n Card Regard n Card Role S ty ty File Attach I Data Export tive Card Con tiss ment Bookin	ding :etting ment : (Deprecated) ifiguration		 	Account Contact Lead	-		×
Alert Le	evel Name a	and Icon 🔞	Alert Level Na	me				
		(Choose file		Browse	ADD	Click here to down	load sample icon
			🌲 Custom			Û		
Default	Value For S	Sorting 😢	Created On			~		
En:	able Cascad	ing Alert 🔞						
🖌 Ena	able Track A	lert 🔞						
Sav	re C	onfigure La	inguages					

- Default Value For Sorting:
 - Select the default value for sorting option for the Global alerts. Select the sorting value from the drop-down. The sorting value that you select here will display as default and sort the alerts accordingly. You can select the default value: "Created On", "Priority", or "Entity".
- Enable Cascading Alert:
 - Manage settings for cascading alerts and tracking of alerts. Checking Enable Cascading Alert checkbox will enable cascading feature in smart alerts
- Enable Track Alert:
 - Checking Enable Track Alert checkbox will enable track alerts feature in smart alerts.
- Click on "Save" button to save or update selected entities.

- Configure Languages
 - Click on "Configure languages" button, to configure Smart Alert in any CRM supported language you want.

Language Configuration	English - United States 🔻 Clear All Save
Text	Value
Add Bulk Alerts	
Name	
Description	
Start Date	

Note: User can use Smart Alerts on selected entities only.

SMS Setup

• To manage the default SMS configuration settings, click on 'SMS Setup' tab.

ορρ	elly
Profile Setup	SMS Setup
Twilio API De	etails
SMS Alerts 😢	
Account SId* 🕜	
Authentication To	ken* 😢
From* 😢	
Save	

- Clicking on SMS Setup page, configure default **Twilio API** details, which you can directly use if you are already a registered user of Twilio. Along with that enter Authentication token and "From" number, from which you want SMSs to be sent to your other users.
- Click on **Save** to configure this one-time SMS Setup.

Manage User Roles

- To assign roles to users, navigate to **Settings -> Security -> Users**.
- In the list, select the user or users whom you want to assign a security role.
- Once users are selected, click on "Manage Roles" option from users list page.
- From dialog box, select the security roles you want to assign.

III Dynamics 3	65 ~ Settings ~	Security		
🕂 NEW 🖍 EDIT 💐	APPROVE EMAIL 🛛 💐 REJECT EMAI	L 🎍 PROMOTE TO ADMIN 🎐	MANAGE ROLES	
+ Enabled	Manage User Ro What roles would you like to apply		×	Q
✓ Full Name ↑	Role Name	Business Unit		Title 🝸 🤪
 Anastasia Sokolo 	Scheduler	appjettyhogger	^	
	Smart Alerts Admin	appjettyhogger		
	Smart Alerts User	appjettyhogger		
	Solution Checker	appjettyhogger		
	Survey Owner	appjettyhogger		
	Survey Services Administrator	appjettyhogger		
	System Administrator	appjettyhogger	-	
		ОК	Cancel	
_				

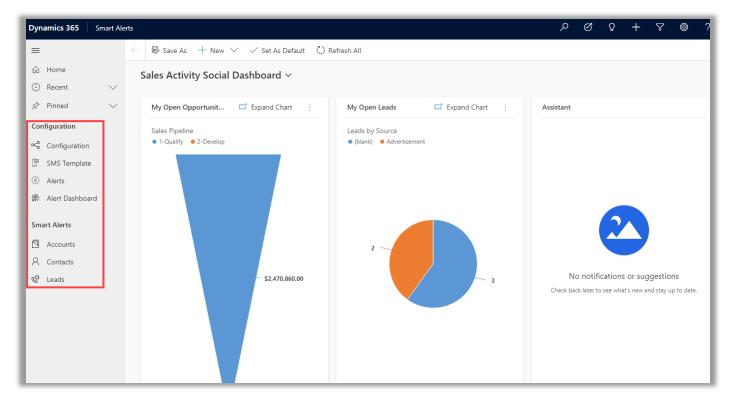
- You can set the following roles for a Smart Alert Users:
 - **Smart Alert Admin**: CRM Admin User will be able to create, view, edit and delete alerts.
 - Smart Alert User: CRM User will be able to create, view and edit alerts. They will not be able to delete alerts.

Smart Alerts

• Click on the "Smart Alerts" from the Dynamics 365 apps to enable the configure the alerts for the DynamicsCRM entities.

amics 365 Dynamics 365 — cust	om			४ ४ ४ ४ ४	©? ≅×
Provides access to Dynamics 365 App for Outlook for enabled users. Dynamics 365 UNIFIED INTERFACE	Field Service allows organizations to deliver intelligent, world class field Dynamics 365 UNIFICE INTERFACE	Dynamics 365 Field Service Mobile is a fully customizable, multi-device Dynamics 365 UNITED INTERFACE	A simplified admin app that includes a live chat demo. Dynamics 365	A unified and consistent experience for your agents interacting across Dynamics 365 UNIFIED INTERACE	
Connichannel for Custom A unified experience for your agents	 Project Resource Hub Project Resource Hub Module	Project Service Project Service	Resource Scheduling Provides access to the Resource	Sales Hub Modernize the sales experience with	
	Dynamics 365 UNIFIED INTERFACE	Application. Dynamics 365 UNIFIED INTERFACE	Scheduling solution Dynamics 365 UNIFIED INTERFACE	this mobile relationship Dynamics 365 UNIFIED INTERFACE	
 Sales Team Member Team Member access to the Dynamics 365 Sales app module.	 Smart Alerts Smart Alert plugin allows CRM users to add various alerts.	 Solution Health Hub Solution Health Hub enables rules- based validation on the health of			
Dynamics 365 UNIFIED INTERFACE	AppJetty UNIFIED INTERFACE	Dynamics 365 UNIFIED INTERFACE			

• By clicking on the "Smart Alerts", you will navigate to the Smart Alerts app page.



• You will see option of the Smart Alerts app from the navigation panel on the left side. You will get the three entities: Accounts, Contacts, and Leads.

Configuration

• By clicking on the "**Configuration**", the Smart Alert app configuration page will redirect. From here, any DynamicsCRM admin can configure License Details, Setup for App, and enable the SMS-Twilio.

=	Goppjelly Expires On: Status:
☆ Home	
🕒 Recent 🗸 🗸	Profile Setup SMS Setup
🖈 Pinned 🗸 🗸	Purchase License
Configuration	Your free trial is currently active. You can purchase the plugin anytime by clicking on the below button.
📽 Configuration	Buy Now
SMS Template	
④ Alerts	License Details
# Alert Dashboard	
	License Key:
Smart Alerts	Your free trial will expire in 9 day(s)
Accounts	Note: This is not real time information and will be updated in the next 24 hours.
8 Contacts	For any queries, visit AppJetty Support
🖑 Leads	

Bulk Alert

Add Bulk Alert

- Navigate to any entity for which you want to set alerts.
- For example, if you want to set alerts for Accounts, go to **Accounts** from the left navigation pane. Select records for which you want to set alert.

:::: Dynamics 365	Sr	mart Alerts	<u>`</u>				୦ ସ	Q + ∀ @ ?
=		← 🕼	Show Chart + Add Alert	View Alert	🕂 Add Criteria Alert 🛛 🖉 Edi	t 🗋 Activate	👌 Deactivate 🛛 🗐 Delete 🗎 🔪	🗸 🕅 Geo Code 🗄
☆ Home		My	Active Accounts ~					Search this view
, in the second	~	~	Account Name \uparrow \checkmark		Main Phone \vee	Address 1: City \smallsetminus	Primary Contact \vee	Email (Primary Contact)
Configuration		~	Aryan		753951			
⊷a Configuration		~	Bella		856314		James John	
📱 SMS Template		~	Christ					
Alerts		~	Fransis		852369			
해 Alert Dashboard								
Smart Alerts								
Accounts								
A Contacts								
🌾 Leads								

- Click on "ADD ALERT" button, this will open a new window for creating bulk alert, applicable for all records which are selected.
- Name: It will help to identify the alert by its name.
- **Description**: It will contain the brief description of alert.
- **Start Date:** It will hold the date from which the alert will be active.

A	ddBulkAlerts.html - Dynamics 365 - Google Chrome	- • ×
<u> </u>	Add Bulk Alerts	
	Add Bulk Alerts	
Name *	New updates	
	Please checkouts the Form builders	
Description *		
Start Date *	08/09/2021	
Expires	\checkmark	
Expiry Date*	08/16/2021	
Alert as	Popup Image: Form notification Global notification Right Panel	
Priority	High	~
File Name	debug.log Browse	Attach
Include User/Team *	smartalert uat X	Q
Alert Level		
🔾 🌖 Informa	ation 🔿 🜗 Warning 🔿 😣 Critical 🔿 🌲 Custor	m
) 🖲 Team M	embers	
Enable Cas	scading	
	Save	

<u>Note</u>: You can set the 'Date format' from the Personal Options of the Dynamics. By clicking on the **Settings** icons from the main header, the **Set Personal Option** window will appear. Click on **Formats** \rightarrow **Customize** \rightarrow Date. Based on the selection there, the date formats will be displayed for your notifications.

- **Expires:** If it is checked, then it will hold the date on which your alert will expire.
- **Expiry Date:** It will set the expiry date for alert.
- Alerts As: Select the option of how you would like to view alert:
 - **Popup:** By checking the popup checkbox, you will get the popup slider from the right side when particular record is opened.
 - Form Notification: By checking this checkbox, you will get the notification under the name of records.
 - **Global Notification:** By clicking this checkbox, you will get the notification from A icon on the right side of the header menu.

- Include Users: Select all those users, whom you want should be alerted of that particular activity. Once selected, only selected users will receive notifications as per the selection of Alert: Popup Alert/Form Notification/Global Notification.
- Alert Level: You can set the alert type as per your requirement. Here, you will see the three default types as Information, warning, and critical. You will get the additional custom Alert Levels as you have added from the app setup.
- Enable Cascading: It will allow to cascade the alerts of related entities` records with current entity record. So, for example: In account module, if contact's module records are set as cascading, then while accessing account, it will display alerts of account as well as contact's alert which are related to that account.

<u>Note</u>: Cascading can only be set for listed entities: Account, Contact, Case, Lead, Opportunity, Quote, Order and Invoice modules.

Success	
Alert added successfully	
	ок

- Once you fill the details, click on **"Save"** button.
- It will display success/failure message.

View Bulk Alert

• Navigate to an entity for which you want to view alerts. For example, if you want to view alerts for contacts, go to **Sales -> Contacts**.

♥ VIEW ALERT	🛅 DELETE 🛛 🕶 EMAIL A LINK 🖌 🚥 🚥
-⊨ My Active Contacts ▼	Search for records
□ Full Name ↑	Email Company N. 🝸
Jim Glynn	someone_j@example Coho Winery
Maria Campbell	someone_d@example Fabrikam, Inc.
Nancy Anderson	someone_c@example Adventure Works

• Click on 'View Alert' to view the list of bulk alerts and criteria alerts.

All Aler		v Bulk Ale Filter Option)		2
			Search:		
Name	Description	Start Date	Expiry Date 🍦	Status 🔶	Alert Type
Email Address Updated	Email Address Updated for 3 Contacts	3/30/2020	3/30/2020	Active	Information
Created On		3/27/2020) 11:44 AM		
Created By		Smart Te	ech		
Action			D		
Mobile Number Added	Business Phone Added For Contacts	3/30/2020	3/30/2020	Active	Information
New Case Created	Case: Created by Smart Tech	4/10/2020	4/10/2020	Active	Information

- List will also have option to filter alerts. Filter options are as below:
 - All Alerts It will list all alerts.
 - Active Alerts It will list active alerts and you can "Deactivate" active alerts.
 - Inactive Alerts It will list inactive alerts and you can "Activate" inactive alerts.
 - **Expired Alerts -** It will list expired alerts.
 - **Pop-up Alerts** It will list all pop-up alerts.

Alert Type	Information
Created On	3/27/2020 11:44 AM
Created By	Smart Tech
Action	

• For alerts created, you can **edit** and **delete** them by clicking on action icons as required.

Edit Bulk Alert

• In edit view, you can edit all the information as required and click on Update button to complete the changes.

Enable	Cascading	
	UpdateCa	ancel
		Search:
Entity	Account Name	Action
Account	Jenifer	
Account	Kabir	

• On edit bulk alert, you can also view particular record for which that particular alert is created.

<u>Note</u>: Only user with **'Smart Alerts Admin'** or **'System Administrator Role'** will be able to delete an alert.

Alert for Entity

Add Alert

- Navigate to an entity for which you want to set alerts. For example, if you want to set alerts for contacts, go to **Sales -> Contacts.**
- Click on record name and navigate to detail view of that particular record.

Ⅲ	Dynamics 365	~	Sales	~	Contacts	>	Maria C	ampb	ell
O A	DD ALERT O VIEW AL	ERT -	NEW ····				Υ	≁	я
	Maria	Cai	mpbe		Έ		Own	er [*] Anast	asia
٩S	- Summary								
CONTACT INFORMATION									
	Full Name *	Maria (Campbell						
	Job Title	Purcha	sing Manager						

Click on "Add Alert" button to add new alert and fill require details as mentioned below:

- Name: It will help to identify the alert by its name.
- **Description**: It will contain the brief description of alert.
- Start Date: It will hold the date from which the alert will be active.
- **Expires:** If it is checked, then it will hold the date on which your alert will expire.
- **Expiry Date:** It will set the expiry date for alert.
- Alerts As: Select the option of how you would like to view alert:
 - **Popup:** By checking this checkbox, you will get the popup slider from the right side when particular record is opened.
 - Form Notification: By checking this checkbox, you will get the notification under the name of records.
 - **Global Notification:** By clicking this checkbox, you will get the notification from A icon on the right side of the header menu.
- Include Users: Select all those users, whom you want should be alerted of that particular activity. Once selected, only selected users will receive notifications as per the selection of Alert: Popup Alert/Form Notification/Global Notification.

Alert Level: You can set the alert type as per your requirement.
 Here, you will see the three default types as Information, warning, and critical. You will get the additional custom Alert Levels as you have added from the app setup.

	Add Alerts
Name *	Account update
Description *	Account details are updated
Start Date *	08/10/2021
Expires	
Expiry Date	₩
Alert As	Popup Form notification Global notification Right Panel
Priority	High 🗸
File Name	Choose file Browse Attach
Include User/Team *	smartalert uat × Q
Alert Level	
🔿 🌗 Inform	ation 🔿 🜖 Warning 🔿 😣 Critical 🔿 🌲 Custom
🖲 🛢 Team M	lembers
Enable Ca	scading
	Save

• Enable Cascading: It will allow to cascade the alerts of related entity's records with current entity record. So, for example: If in account module, contact's module records are set in cascading, then while accessing account it will display alerts of account as well as contact's alert which are related to that account.

<u>Note</u>: Cascading can only be set for listed entities: Account, Contact, Case, Lead, Opportunity, Quote, Order and Invoice modules.

• Once you fill the details, click on "Save" button. It will display success/failure message.

Success
Alert added successfully
ок

View Alert

• Navigate to detail view of that specific record.

+ ADD ALERT	O VIEW ALERT	+ NEW	DEACTIVATE	an co	NNECT -	•••	↑ ↓
	contact - Sidney Hi Assigned To user	ga ⁼≡					Owner* Smart Tech
✓ Summ							
CON	ITACT INFORMA	TION	POST	S	ASSISTANT	ACTIVITIES	NOTES
Full	Name *	Sidney Higa					
Job	Title	Owner	Enter po	ost here			
Acco		Blue Yonder					POST

• Click on "View Alert" to view the list of alerts.

View Alerts									
Alerts Ali Aler	ts 🗸	Filter Optic	Search:		C				
Name	Description	Start date 🗍	Expiry date 🌲	Status 🔶	Is Bulk Alert				
email Address Updated	Email Address Updated for 3 Contacts	3/30/2020	3/30/2020	Active	Yes				
Alert Type		Informa	ation						
Created On		3/27/20							
Created by		Smart	Tech						
Action		1							
Mobile Number Added	Business Phone Added For Contacts	3/30/2020	3/30/2020	Active	Yes				
New Case Created	Case: Created by Smart Tech	4/10/2020	4/10/2020	Active	Yes				

- You can add new alert from view page by clicking on "New" button.
- The list will also have option to filter alerts. Filter option are as below:

- All Alerts It will list all alerts.
- Active Alerts It will list active alerts and you can "Deactivate" active alerts.
- Inactive Alerts It will list inactive alerts and you can "Activate" inactive alerts.
- **Expired Alerts -** It will list expired alerts.
- **Pop-up Alerts –** It will list all pop-up alerts.
- For alerts shows, you can edit, delete as well as track alerts.

• **<u>Note</u>**: Alert under the Entity can only be edited and viewed from bulk alert list.

Criteria Alert

Add Criterial Alert

• Navigate to any entity for which you want to set criteria alerts. For example, if you want to set alerts for accounts, click on the **Accounts**.

Dynamics 365	Smart A	lerts				ତ ସ	β + ∇ ⊗ ?	۵
=	←	🛱 Show Chart 🛛 🕂 Add Alert	View Alert	+ Add Criteria Alert	+ New Notification	🗊 Delete 🗸 💍 Refre	sh 🖾 Email a Link \vee 🛛 :	
Ĥ Home ⊕ Recent ∨	I	My Active Accounts $ imes$					∑ Search this view	
✓ Pinned ✓	~	Account Name ↑ 🗸		Main Phone \sim	Address 1: City \vee	Primary Contact \checkmark	Email (Primary Contact) \vee	
Configuration		Aryan		753951				
Configuration		Bella		856314				
SMS Template		Christ						
Alerts		Fransis		852369				
🛱 Alert Dashboard								
mart Alerts								
Accounts								
ς Contacts								
🖗 Leads								

- Click on " + Add Criteria Alert" button, this will open a new window for creating criteria alert, applicable for all records as mentioned in the query.
- Name: It will contain the brief description of alert.
- Entity: It will show the entity name for which the alert is being set.
- FetchXML: User needs to add FetchXML Query file.
- **Description:** Add the description of the alert that you wish to view.

	Add Criteria Alert						
Name *	Employee Query						
Entity	Account ~						
FetchXML*							
Description*							
Notification Type	Email SMS						
Include Users	Smart Tech 🔹						
Alert Type Information Warning Critical 							
	Save Cancel						

- Notification Type: For critical alert by default form notification is shown upon accessing a particular record. Other than that, you can select Email and SMS as the notification form. SMS option will be shown only when SMS set up has been done.
- Include Users: You can select users to whom alert should be shown.
- Alert Type: It will set the alert type as Information, Warning or Critical.
- Once you fill the details, click on **"Save"** button.
- It will display success/failure message.

View Criteria Alert

• Navigate to an entity for which you want to view criteria alerts. For example, if you want to view alerts for contacts, click on the **Contacts** from the navigation pane.

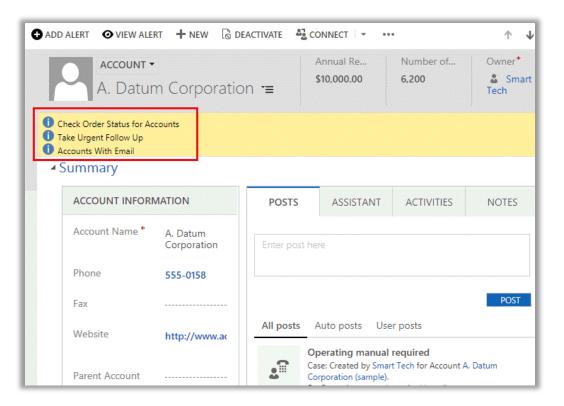
View Criteria Alerts								
				Search:				
Name	¥	Entity 🔶	Alert Type	Description	Created On 🔶			
Active Contact		Contact	Information	Contact's Assigne user	ed To 3/27/2020 11:46 AM			
Created By				Smart Tech				
Action				•				
Showing 1 to 1 of 1 entries								

- Clicking on 'View Alerts', user will also be able to view criteria alerts created for the particular entity.
- For each criteria alert, there are different action buttons like **View**, **Edit** and **Delete**.

		View C	Criteria Alert							
	Name	Active Contact								
	Entity Contact ~									
	<pre><fetch distinct="false" mapping="logical" output-format="xml-platform" version="1.0"> <entity name="contact"> <entity <="" entity="" name="contact"> <entity <="" entity="" name="contact" name<="" th=""></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></entity></fetch></pre>									
Contact's Assigned To user Description										
	Notification Type	🖌 Email 🛛 🗸 S	MS							
		ers Smart Tech								
	Alert Type Info	e rmation 🔿 🚺 Warni	ng i 😣 Critical							
			Se	earch:						
Full Name		Company Name 🍦	Business Phone	Email						
Jim Glynn	^	-	555-0109	someone_j@example	.com					
Maria Cam	pbell	-	555-0103	someone_d@exampl	e.com					
Nancy And	erson	-	555-0102	someone_c@example	e.com					

- Clicking on **View**, you also get to know with which records criteria alert is associated to.
- If you have **checked** the **email** option at the time of adding criteria alert, on fulfilling the alert condition, you will get an email.

• If you click on any record, it will open the detail page of that record and the **criteria alert messages** will be displayed as "Form notification" near the name of the record.



Alerts

- Click on the "Alerts" from the navigation pane. You can view all the Alerts on the single page.
- You can view the alerts with the details such as Name, Description, Alert Level, Type, Priority, Created On, By, User/Team, Action.

Dynamics 365	Smart Alerts					ېر	D Q (Q ·	+ 7	۵? ۵
≡										
命 Home	+ Add Announce	ment								3
$$ Recent \checkmark	All Alerts	All Entity		View All Ale	erts					0
🖈 Pinned 🗸 🗸	74174010							1	Search:	
Configuration	Name 🍦	Description	Alert Level 🔶	Alert Type	Priority 🗍	Created On 🔻	Created by	÷ I	Users/Teams	Action
Configuration SMS Template	single	single	Custom	Single Alert	Medium	8/5/2021	SmartAlert L	JAT 9	smartalert u	4 • 2 • •
Alerts	Check ALert form	Check ALert form	Information	Single Alert	Medium	7/23/2021	SmartAlert L	JAT s	smartalert uat	
 # Alert Dashboard Smart Alerts 风 Accounts 	Announcement UAT Alert	Assemble in hall for group training Assemble in hall for group training Assemble in hall for group training Assemble in hall for group training Assemble in hall for group training	Warning	Announcement Alert	Medium	7/22/2021	SmartAlert L	JAT :	smartalert uat	
Contacts Leads	Ann2	Assemble in hall for group training	Information	Announcement Alert	Very High	7/22/2021	SmartAlert L	JAT s	smartalert uat	
	Contact Alert	Contact Bulk Alert Text Contact Bulk Alert Text Contact Bulk Alert Text Contact Bulk Alert Text Contact Bulk Alert Text Contact Bulk Alert Text Bulk Alert Text	Critical	Bulk Alert	High	7/22/2021	SmartAlert L	JAT :	smartalert uat	

1. You can filter the list of the alerts by "Alert Type" and "Entity Type".

- 2. You can search the specific alert by inserting the text caption.
- **3.** You can refresh and update the alerts by clicking on the 'Refresh' icon.
- **4.** You can perform the action like View, Edit, Delete, Alert Status.
- Here, the admin users will get all the users' alerts in the list. But, the normal users (team members) only can see their individual alerts.
- You can filter and search the alerts as per the "Alerts Type":

	> All Alerts	> Announcements Alerts	> Criteria Alerts	> Record Alerts.
_				

=				
ŵ	Home	+ Add Announcement		
Ŀ	Recent 🗸	All Alerts	View All	Alerts
Ŕ	Pinned 🗸 🗸	All Alerts		
Cor	nfiguration	Announcement Alerts Criteria Alerts Record Alerts	Alert Level 🔶	Alert Type
~	Configuration	New Team A new salesperson joining the Pre-Sales team	T	
ŗ.	SMS Template	Member is joining next week	Team Members	Announcement
٥	Alerts	single single	Custom	Single Alert

• You can filter and search the alerts as per the "Entity Type" that are enabled.

ŵ	Home		+ Add Announce	ment						
Ŀ	Recent	\sim					1			
\$	Pinned	\sim	All Alerts			All Entity ~ All Entity				
Con	figuration		Name	÷	Des	Account Contact Lead		÷		
~	Configuration		New Team				n joining the Pre-Sa	ales team		
(F	SMS Template		Member is join	ing	next week					
٥	④ Alerts 북 Alert Dashboard		🕒 single	🕒 single		single				
			Check ALert form		Check ALert form					
					Asse	emble in hall fo	or group training A	ssemble		

Add new Announcement Alert

• You can add a new general announcement (global announcement). To add a new announcement, click on the **+ Add Announcement**.

nart Alerts		Add Announcement Alerts - Dynamics 365 - Google Chrome –	Q
+ Add Announc	ement	Add announcement alert	Π
All Alerts	✓ All Entity	Name *	
Name	Description	Description *	l by
single	single		lert UAT
Check ALert form	Check ALert form	Start Date * 08/09/2021	ert UAT
Announcement UAT Alert	Assemble in hall t training Assemble group training As for group training hall for group tra in hall for group t	Expires	ert UAT
Ann2	Assemble in hall t training	Include User/Team * Q	ert UAT
Contact Alert	Contact Bulk Aler Bulk Alert Text Co Alert Text Contac Text Contact Bulk Contact Bulk Aler Bulk Alert Text	Alert Level Information Information	lert UAT
UATAlert	υΑΤυΑΤΟΑΤΙΑ	Save Cancel	ert UAT
Test	Announcement t		ort LIAT

• You will get the popup named Add announcement alert.

- You need to insert following details for the Announcement alert:
 - o <u>Name</u>: Insert relevant announcement to identify the alerts for what.
 - <u>Description</u>: Insert short message/description to share any update or message.
 - <u>Start Date</u>: It will select current date by default. You can change the date when you want to share announcement.

Add A	nnouncement Alerts - Dynamics 365 - Google Chrome	
	Add announcement alert	
Name *	New Team Member is joining	
Description *	A new salesperson joining the Pre-Sales team next week	G
Start Date *	08/09/2021	
Expires	\checkmark	
Expiry Date*	08/16/2021	
Priority	High	\sim
Include User/Team *	smartalert uat X	Q
Alert Level		
🔿 🌗 Informa	ation 🔿 🌗 Warning 🔿 😣 Critical 🔿 🌲 Custor	m
● PTeam M	embers	
	Save Cancel	

- <u>Expires</u>: If you want to set the alert for limited duration, enable this option to select the expiry date.
- Expiry Date: Select the expiry date for announcement alert.
- <u>Priority</u>: Set the priority of the announcement alert.
- Include User/Team: Insert the required User/Team to send the announcement alert.
- <u>Alert Level</u>: You can select the Alert Level (Alert type). Here you will get the Alert levels except default three (Information, Warning, and Critical) that are added from the app setup.

• After inserting the required details, click on the **Save** button and announcement will be shared with the selected User/Team.

Edit/View Alerts

• You can perform the actions of the alerts by clicking on the + icon.

+ Add Announcer	All Entity V	View All	Alerts		Search:			
Name		Alert Level 🛛 🍦	Alert Type	Priority 🌲	Created On 🔻	Created by	Users/Teams	
New Team Member is joining	A new salesperson joining the Pre-Sales team next week	Team Members	Announcement Alert	High	8/9/2021	SmartAlert UAT	smartalert uat	
New updates	Please checkouts the Form builders	Team Members	Bulk Alert	High	8/9/2021	SmartAlert UAT	smartalert uat	
R single	single	Custom	Single Alert	Medium	8/5/2021	SmartAlert UAT	smartalert uat	
 Check ALert form 	Check ALert form	Information	Single Alert	Medium	7/23/2021	SmartAlert UAT	smartalert uat	
 Announcement UAT Alert 	Assemble in hall for group training Assemble in hall for group training Assemble in hall for group training Assemble in hall for group training Assemble in hall for group training	Warning	Announcement Alert	Medium	7/22/2021	SmartAlert UAT	smartalert uat	
Ann2	Assemble in hall for group training	Information	Announcement Alert	Very High	7/22/2021	SmartAlert UAT	smartalert uat	

• You can perform the action for the alerts. View, Edit, Delete, and Alert status.

+ Add Announce All Alerts		Search:	Ŕ				
Name	$\frac{1}{2}$ Description	Alert Level	Alert Type	Priority 🔶	Created On 🔻	Created by	Users/Teams 🗍
New Team Member is joining	A new salesperson joining the Pre-Sales team next week	Team Members	Announcement Alert	High	8/9/2021	SmartAlert UAT	smartalert uat
🕒 New updates	Please checkouts the Form builders	Team Members	Bulk Alert	High	8/9/2021	SmartAlert UAT	smartalert uat
single Action	single	Custom	Single Alert	Medium	8/5/2021	SmartAlert UAT	smartalert uat
Check ALert form	Check ALert form	Information	Single Alert	Medium	7/23/2021	SmartAlert UAT	smartalert uat

Alert Dashboard

• Click on the "Alert Dashboard" to track and check the user wise alerts. You will get the user wise alerts count.

Image: Book and the second	Users/1	Teams: SmartAlert UAT	Search:
S Pinned ∨		User/Team	Alerts Count
Configuration	0	SmartAlert UAT	16
⊷a Configuration	Showing	g 1 to 1 of 1 entries	3
📅 SMS Template			
Alerts			
# Alert Dashboard			
Smart Alerts			
Accounts			
A Contacts			
🌾 Leads			

• You will see "Users/Teams" drop-down option to check the user wise alerts.

sers/Teams:	SmartAlert UAT	Search:
User/T	Renee Lo (Sample Data) Sanjay Shaw (Sample Data)	🔶 Alerts Count
SmartA	SmartAlert UAT	16
nowing 1 to 1 of 1	Spencer Low (Sample Data) (entries	

• You can select multiple Users/Teams by checking the checkbox.

			Search:
	User/Team	₹	Alerts Count
0	Sanjay Shaw		10
0	SmartAlert UAT		16
0	Spencer Low		5
0	Sven Mortensen		4
Showi	ng 1 to 4 of 4 entries		

• By clicking on the + icon of the specific User/Team, you will see the list of alerts with the details like Name, Description, Alert Level, Type, Priority. Created On., By, Users/Team and Action for the alerts.

	User/	Team	Alerts Count								
0	Sanjay	/ Shaw (Sample Data)	10								
•	Smart	Alert UAT	22								
Search:											
Name		Description \Leftrightarrow	Alert Level	Alert Type	Priority 🌲	Created On	♦ Created by \$	Users/Teams	Action		
Ann2		Assemble in hall for group training	Information	Announcement Alert	Very High	7/22/202	1 SmartAlert UAT	smartalert uat			
Announ ment U/ lert		Assemble in hall for group training Assemble in h all for group training Assemble in hall for group t raining Assemble in hall for group training Asse mble in hall for group training	Warning	Announcement Alert	Medium	7/22/202	SmartAlert UAT	smartalert uat			
Bulk Tes erts	st Al	Bulk Alert Description Bulk Alert Description Bulk Alert Description Bulk Alert Description Bulk Aler t Description Bulk Alert Description Bulk Alert De scription	Critical	Bulk Alert	Medium	7/20/202	SmartAlert UAT	smartalert uat			
Bulk Tes erts	st Al	Bulk Alert Description Bulk Alert Description Bulk Alert Description Bulk Alert Description Bulk Aler t Description Bulk Alert Description Bulk Alert De scription	Critical	Bulk Alert	Medium	7/20/202	SmartAlert UAT	smartalert uat			
Bulk Tes erts	st Al	Bulk Alert Description Bulk Alert Description Bulk Alert Description Bulk Alert Description Bulk Aler t Description Bulk Alert Description Bulk Alert De scription	Critical	Bulk Alert	Medium	7/20/202	SmartAlert UAT	smartalert uat			
Showing 1	1 to 5 (of 22 entries						1 2 3	4 5 Next		

Popup Alerts (Record Popup Alerts)

- If you click on any record, it will open the detail page of that record and **popup alert** message will be displayed sliding from the right which can be collapsed and expanded as required.
- In the pop up, alerts are bifurcated based on alert type like **Information**, **Warning**, **Critical**, Cascading. Also, it has All section that lists out all the alerts.

Dynamics 36	5 🗸 Smart Alerts Smart Alerts > Accounts > John Tech		Alerts 🖾 🗙
=	\odot + Add Alert \odot View Alert + New $\frac{9}{60}$ C	open Org Chart 🛛 🗋 Deactivate 🦷 R Connect 🗸 🚎 Add to N	All Information Warning Critical Cascading
命 Home	You have 2 notifications. Select to view.		Alert 01 For account
🕒 Recent 🗸 🗸	John Tech		Alert 01 For account
🖈 Pinned 🗸 🗸	Account - Account ~		Detail Updated x
Configuration	Summary Details Files Related		
Configuration	ACCOUNT INFORMATION	Timeline + \bigtriangledown ···	Clead Follow up
SMS Template	Account Name *	Enter a note	
Smart Alerts	John Tech	What you've missed (Click To Filter)	
	Phone	New posts (1)	
Accounts			
8 Contacts	Fax	Auto-post on John Tech 1:52 PM 🖓	
😵 Leads		Account: Created By Keith Hogger.	
	Website		
	Parent Account		
	Ticker Symbol		
	E2 Active		Dismiss All

Form Notification

• If you click on any record, it will open the detail page of that record and the **Form Notification** will be displayed above the name of the Record. Here by clicking on **Select to View**, the list of the notification will be expanded.

Dynamics 36	5 ∨ Smart Alerts Smart Alerts > Accounts > John Tech			م	Ø	۶ +	Y	4	ø	?	8	
=	⊙ + Add Alert © View Alert + New ♣ C	pen Org Chart 🛛 🗋 Deactivate	역 Connect 🗸	= Add to Mark	eting List	워, Assign	t≊ Er	nail a Linl	· ···			
යි Home	You have 2 notifications. Select to view.										^	
🕒 Recent 🛛 🗸	(!) Alert 01 For account											
🖈 Pinned 🗸 🗸												
Configuration	Summary Details Files Related											
	ACCOUNT INFORMATION	Timeline	-	- 7	Relat	tionship Assi	stant				14	
Configuration SMS Template	Account Name *	Enter a note										
SMS lemplate	John Tech	Enter a note		 There are currently no insights. 								
Smart Alerts	Phone	What you've missed (Cli	ick To Filter)	×								
Accounts		New posts (1)			P	rimary Conta	ct					
A Contacts	Fax	-										
& Leads		Auto-post on John Account: Created By		1:52 PM 🤤	CON	CONTACTS					18	
	Website											
	Parent Account					No	data av	ailable.				
	Ticker Symbol				RECE	NT OPPORT	UNITIES					
								L				

• By clicking on any Entity Form's alerts, you will see all the alerts in the popup view.

\leftarrow + Add Alert @ View Alert 🔒 S	ave 🛱 Save & Close 🕂 New 🖧 O	pen Org Chart 🛛 Deactivate 원 C	Connect V 🚎 Add to Marketing List
You have 4 notifications. Select to view.			~
Aryan Account - Account ~	Alerts		SmartAlert UAT vinual Revenue Number of Employees Owner
Summary Project Price Lists Assets	Alert Filter Created On All Oldest To New] [] ;
ACCOUNT INFORMATION	🗴 Bulk Test Alerts		Assistant
Arcount ivame" Aryan Phone 753951	Bulk let Description Bulk Alert Description Description Bulk Alert Description Bulk Aler Alert Description Bulk Alert Description 7/20/2021 2:07 PM		No notifications or suggestions Check back later to see what's new and stay up to date.
Fax	Single chek Single chek 7/20/2021 3:19 PM	× 2021 2:01 PM 🗸	
Website https://Aryan@gtr.com Parent Account	Check ALert form Check ALert form 7/23/2021 12:11 PM	×	Primary Contact CONTACTS
	Dismiss All		Aryannew Contact
Ticker Symbol			Aryangrettom
Relationship Type			

• Here you will get the Filter options to filter the alerts.

Global Notification

- Global Notification will display to the selected users while creating alerts.
- When the user gets the new notification, it will be displayed with the red dot on the notification icon.

::: Dynamics 36	5 ∨ Smart Alerts Smart Alerts ≻ Accounts			୦ ସ	9 + 7 🕫 ?	R
=	🛱 Show Chart 🕂 Add Alert 🐵 View Alert 🕂	– Add Criteria Alert 🛛 🕂 New	🛍 Delete 🗸 🛛 🖒	Refresh 🛛 🖓 Email a Link	∨ ₀/ª Flow ∨ Notification	
යි Home	My Active Accounts $$				Search for records	Q
🕒 Recent 🗸 🗸		• — L		- 1		
🖈 Pinned 🛛 🗸	Account Name	1 V Main Phone	Address 1: City	Primary Contact		
	D_Alert Process					
Configuration	Jenifer					
🛱 Configuration	John Tech					
📱 SMS Template						
Smart Alerts						
Accounts						
A Contacts						
🌾 Leads						

• By clicking on notification a icon, the slider will be displayed from the right side including all the notification under the heading **Alerts**.

Dynamics 365 Si	nart Alerts		Alerts 🗠 🗙
₩ Home	Users/Teams: SmartAlert UAT	Global Alerts>	Alert Level Filter By
Is Recent ∨Is Pinned ∨	User/Team		New Team Member is joining A new salesperson joining the Pre-Sales team next week
Configuration	SmartAlert UAT		High 8/9/2021 5:21 PM
 Configuration SMS Template Alerts 	Showing 1 to 1 of 1 entries		Ann2 Assemble in hall for group training Very High 7/22/2021 2:49 PM
Alert Dashboard			Announcement UAT Alert Assemble in hall for group training Medium 7/22/2021 2:48 PM
😵 Leads			test Announcement Alert Announcement to have a day off next week High 7/20/2021 12:52 PM
			single X Medium account V Dismiss All

- Here you will get the Filter options to filter the alerts. You will get the default filter selected as per the app settings from the configuration.
- You can filter the alerts by the "Alert Level" and "Filter Value" (Filter By).

SMS Alert

- SMS Alerts are sent for **criteria alerts** as well as **process-based SMSs**. Criteria SMS alert will be sent only when records matching those criteria have phone numbers associated with them.
- For all SMS alerts created or sent, you can view them under **Activities -> All SMS Messages**.
- For adding SMS description, you can also choose pre-defined description in form of templates. These SMS templates are available within **AppJetty > SMS Templates**.

📰 Dynamics 365 🗸 AppJetty	∽ SMS Templates → 、ク ③ +
🕂 NEW 🗴 DELETE 🖿 🗢 EMAIL A LINK 🖿	□/□ FLOW ▼ 🕑 RUN REPORT ▼ 🚺 EXCEL TEMPLATES ▼
-⊨ Active SMS Templates ×	Search for records
□ Name ↑	Description
Lead Generation	You have successfully registered yourself.
Welcome Template	Welcome to the organisation. We'll be glad to as

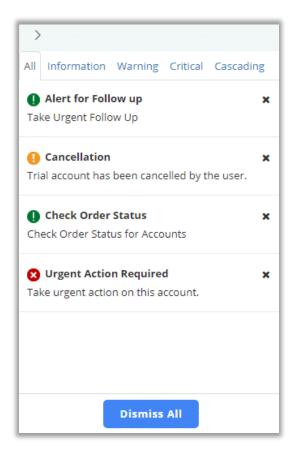
• On navigating to SMS templates, you can view the list of all created templates. You can create as many templates as you want by clicking on New button.

Note: SMS templates option will be available only when SMS setup is done.

Track Alerts

- From the pop up, user gets option to dismiss alert. Any alert once dismissed will get removed as pop up notification which means it won't be available on again opening the record in the pop up.
- To dismiss an alert, you may just click on the cross icon available with every alert and to dismiss all alert at once just click on Dismiss All button.

Note: Alerts that are not dismissed, are marked as read under alert track status.



- Admin user can view the status of the record i.e. If it is read or dismissed from the detail view of the specific record.
- Navigate to detail view of the record, click on View Alert option. Click on bell icon available with each alert record.

	Vi	ew	Alerts		
Alerts All Alert	is v				C
New			Search:		
Name	Description	÷	Start date 🍦	Expiry date 🍦	Status 🍦
Alert for Follow up	Take Urgent Follow Up		2019-08-02	-	Active
Is Bulk Alert			Yes		
Alert Type			Information		
Created On			8/2/2019 2:56	PM	
Created by			Smart Tech		
Action					

• Clicking on the icon, track alerts screen shows up that status of specfic alert. You can further filter results based on users or track status as required.

rack Type:	Users :		
All	Smart Tech	•	
All Read Dismiss	Search:		
User	Read/Dismiss date	\$ Status	-
Smart Tech	8/3/2019 11:13 AM	Read	
Smart Tech	8/5/2019 10:49 AM	Dismiss	

Send SMS via process

- To send SMS using workflow, you need to follow default "CRM flow" for creating workflows.
- Navigate to **Settings** → **Processes**.
- Select New to create a new process. Enter valid process name, entity for which the process is being created and select Workflow as the Category.

Process name: *	Sending SMS Alert			
Category: *	Workflow *	Entity: *	Account	•
Run this workf	low in the background (recommended)			
Туре:	New blank process New process from an existing templa	te (select from list):		
Templa	te Name ↑	Primary En	ntity	Owne
				×

- Click on **OK** to proceed further.
- Here you may select the action as required for workflow to work.
- For SMS to be sent, you need to create a message record.

Activate As Available to Run Run this workflow ir As an on-demand p As a child process Workflow Job Retenti	ending SMS Alert Process T In the background (recommended) rocess	Entity Category Options for A Scope Start when:	Account Workflow User Record is created Record is assigned Record fields change Select Record is deleted
add Step ▾ │ ⊐+≡Inse	t 🕶 🗙 Delete this step.		

- For creating message record, you need to select SMS Message from the option, and you need to set properties as required.
- Under set properties, you need to enter the phone number or fetch it from dynamic values.

Subject * Dynamic Values Phone Number * Dynamic Values Use SMS Template No SMS Message Image: Constraint of the second secon	biject * bij	Subject * Phone Number * Use SMS Template No Yes SMS Message	No	bject * Dynamic Values none Number * Dynamic Values se SMS Template No (a) Yes MS Message Look for: Account	1 Company		Form Assistant
Phone Number * Use SMS Template SMS Message SMS Message Operator: Set to Look for: Account (Deprecated) Traversed Path Add	Implate	Phone Number * Use SMS Template SMS Message SMS Messag	No	none Number * Operator: se SMS Template No MS Message Look for: Account			Dynamic Values
Use SMS Template No Yes No No Yes No Yes	ee SMS Template No Ves VS Message MS Message Welcome Template	Use SMS Template No Yes No Yes SMS Message (Deprecated) Traversed Path Add	Set to Look for: Account	se SMS Template No Yes Operator: Set to Look for: Account	Subject *		Dynamic Values
SMS Message	AS Message MS Mes	SMS Message	Set to Look for: Account	AS Message Set to Look for: Account	Phone Number *		
Account (Deprecated) Traversed Path Add	mplate	Account (Deprecated) Traversed Path Add	Account	Account	Jse SMS Template	💿 No 💿 Yes	
(Deprecated) Traversed Path Add	mplate Welcome Template Add X	(Deprecated) Traversed Path Add			MS Message		Look for:
Add	mplate Welcome Template Add	Add		(Deprecated) Traversed Path			Account
	mplate Welcome Template 🔍 🖈 👍 🐺		(Deprecated) Traversed Path				(Deprecated) Traversed Path
Template 🖾 🕅 🐨 🐨 🐨		Template 🖾 Welcome Template 🔍 🗙 🗈 🗣		Add			
	egarding		🖫 Welcome Template 🔤 🗙 💧 🗣		emplate	🖫 Welcome Template	
Regarding		Regarding 🗔		emplate 📴 Welcome Template 📮 🗙 👍 📮	Regarding		
Description	escription	Description			Description		
				egarding	-cscription		
Regarding		Regarding	Welcome Template	Add		Welcome Template	Add
escription	escription	escription		egarding	escription		
escription	escription	escription		egarding	escription		
Description	escription	Description			Description		
Description	escription	Description		egarding	Description		
Description	escription	Description			Description		
emplate 🖾 Welcome Template 🖾 🗙 🖕		emplate 🖾 Welcome Template 🖾 🗙 🛉 🗣		Add			
	mplate Welcome Template 🔍 🖈 👍 🐺		(Deprecated) Traversed Path				(Deprecated) Traversed Path
Add	mplate Welcome Template Add	Add		(Deprecated) Traversed Path			
(Deprecated) Traversed Path Add	mplate Welcome Template Add X	(Deprecated) Traversed Path Add			MS Message		
Account (Deprecated) Traversed Path Add	mplate	Account (Deprecated) Traversed Path Add	Account	Account		💿 No 💿 Yes	
Set to Look for: Account (Deprecated) Traversed Path	AS Message MS Mes	Set to Set to Look for: Account (Deprecated) Traversed Path Add	Set to Look for: Account	AS Message Set to Look for: Account			Operator:
Jse SMS Template No Yes No Yes Operator: Set to Look for: Account (Deprecated) Traversed Path Add	ee SMS Template No Ves VS Message MS Message Welcome Template	Jse SMS Template No Yes Operator: Set to Look for: Account (Deprecated) Traversed Path Add	Set to Look for: Account	se SMS Template No Yes Operator: Set to Look for: Account			Dynamic Values
Phone Number * Use SMS Template No Yes Operator: Set to Look for: Account (Deprecated) Traversed Path Add	Inone Number * ise SMS Template Implate Implate Operator: Set to Look for: Account (Deprecated) Traversed Path Add X	Phone Number * Use SMS Template No Yes Operator: Set to Look for: Account (Deprecated) Traversed Path Add	No Ves Operator: Set to Look for: Account	none Number * Operator: se SMS Template No MS Message Look for: Account	ubject *		
ubject * hone Number * Ise SMS Template No Yes MS Message Image: A count (Deprecated) Traversed Path Add	Abject * Index Model Index Mo	ubject * hone Number * Ise SMS Template No Yes MS Message Image Add Image	No	Abject * Dynamic Values Dynamic Valu	General		

- You must also enter the SMS Message or select message based on SMS template. For SMS templates you can select template from the look up selection.
- This would just create SMS record, in order to send SMS message, another step needs to be created within the same workflow process that triggers sending of the SMS
- Add one more step and select option Change Status.

•	SMS Cre	ation				
	Create:	SMS Message	•	Set Properties		
•	SMS Ser	nding				
	Change record status to:		SMS Creation	(SMS Messa 🔻	Pending Sent	٦

- On selecting **Change Status**, you need to select the entity for which status must be changed. Select SMS Message in first dropdown and select status Pending Sent in the second dropdown.
- Changing status of the SMS Message to Pending Sent will send the message.

Public

- Once you are done with the configurations, you need to Save and Activate the process.
- All SMS created and sent from the CRM are easily accessible under Activities -> SMS

Dynamics 365 🗸 Sales	~ Activities > \mathcal{P} \mathfrak{V} + ∇	[?]
🛛 TASK 🛛 EMAIL 📋 APPOINTMENT 🔻	🕻 PHONE CALL 🖹 LETTER 🔑 FAX 🗟 SERVICE ACTIVITY 🚥	
-¤ All SMS Messages ▼	Search for records	Q
Due: All 🔻		
□ Subject ↑	Date Created	$\hat{\rho}$
Accounts With Email	8/2/2019 11:38 AM	Charts
Accounts With Email All Accounts in Redmond City	8/2/2019 11:38 AM 8/2/2019 11:36 AM	
		arts

Send Alerts via process

- To send alerts using workflow, you need to follow default CRM flow for creating workflows.
- Navigate to **Settings** → **Processes**.
- Select New to create a new process. Enter valid process name, entity for which the process is being created and select Workflow as the Category.

Process name: *	Sending SMS Alert					
Category: *	Workflow v	Entity: *	Account	•		
Run this workf	low in the background (recommended)					
Туре:	 New blank process New process from an existing template (select from list): 					
Templa	te Name ↑	Primary Er	ntity	Owne		
				Þ		

• Click on **OK** to proceed further.

- Here you may select the action as required for workflow to work.
- For alert to be sent, you need to create an alert record.

File	🖹 🛛 🖸 Activa	ate 🛛 🙀 Convert to a background wo	rkflow 🛛 📲 Show Dependencies	🗧 Solution Layers 🛛 🗞 Actions 🗸	
Process: Change Based Al	ert			Working on solution: Default Solutio	
Common S. Information Audit History	General Administrat		Entity	Case	
Process Sessions Process Sessions	Activate As	Process	r Category	Workflow	
	Activate As	10003	Workflow Log	Retention	
		w in the background (recommended)		or workflow jobs that encountered errors	
	As an on-deman				
	As a child proces				
	Options for Autom	atic Processes			
	Scope	User	r		
	Start when:	After	Record is created		
		After	Record status changes		
			Record is assigned		
			Record fields change S	elect	
		Before	Record is deleted		
	Execute as: The owner of the workflow				
		The user who made changes to the	record		
	Add Step -	nsert 🕶 🗙 Delete this step.			
	1 -	-			
	Alert For Recor				
	Create: Alert	 Set Properti 	es		

• For creating alert record, you need to select Alert from the option and you need to **Set Properties** as required.

File Save and Clos	e	@ <u>t</u>	Help 🔻
Process: UAT Aleri	t Process	Form Assistant	
Create Alert		Dynamic Values	•
		Dynamic Values	
General		Operator:	
Name *	Process Alert	Set to	Ŧ
Description *	Process Alert Description	Look for:	
		Account	•
		Record Created On	•
Start Date *	2020/04/03	Preferred Facility/Equipment	
s Expires		Preferred Method of Contact Preferred Service	
s Expires	No Yes	Preferred Time	
xpiry Date		Preferred User	
Alert Type *	Warning 🗸	Price List	
		Primary Contact Primary Satori ID	
ntity Logical Name *	account	Primary Twitter ID	
ecord URL *		Record Created On	
		Record URL(Dynamic)	
Additional Fields		Relationship Type	
Additional Fields		SIC Code	
		SLA	
		Send Marketing Materials	
		Shares Outstanding	
		Shipping Method	
		Status	- 1
		Status Reason	
		Stock Exchange	

- Under set properties, you need to enter the relevant information or fetch it from dynamic values. Here using the logical name of entity is mandatory.
- Enter logical name of the entity, e.g. for case logical name is incident.
- Record URL: It's ID of CRM Record to open it. To add Record URL, select the Account under the Operator option and after selecting the "Account" select the Record URL(Dynamic) option under Account selection.
- Once you are done with the configurations, you need to **Save** and Activate the process.

Contact Us

We simplify your business, offer unique business solution in digital web and IT landscapes.



- Get instant support with our Live Chat.
- Visit our product page at: <u>https://www.appjetty.com/dynamicscrm-</u> <u>smart-alerts.htm</u> and click on the Live Chat button for instant support.



- Raise tickets for your specific question!
- Send an email to <u>support@appjetty.com</u> or you can login to your account @ <u>www.appjetty.com</u> and click on My Support Tickets on your account dashboard, to get answers to your specific questions.

Customization:

If you would like to customize or discuss about additional features for **Dynamics CRM Smart Alerts**, please write to sales@appietty.com